

# **JUNEAU AIR AND FERRY VISITOR SURVEY**

## **Summer 2018**

PREPARED FOR:

**Travel Juneau**

January 2019

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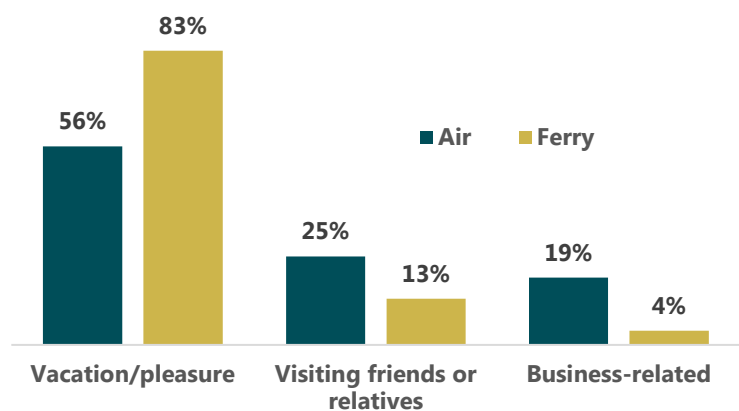
# Executive Summary

Travel Juneau contracted with McDowell Group to conduct intercept surveys of out-of-state visitors at the Juneau Airport and the Alaska Marine Highway Terminal in summer 2018. Respondents were screened to include only those who had stayed at least one night in Juneau. The survey included questions on trip purpose, transportation modes, activities, satisfaction, trip planning behavior, and demographics, among other subjects. A total of 444 air visitors and 284 ferry visitors were surveyed. Following are key findings of the survey.

## Trip Purpose

Among air visitors, over half (56 percent) were traveling for vacation/pleasure; 25 percent to visit friends or relatives (VFR); and 19 percent for business (including 14 percent for business/pleasure and 5 percent for business only). Ferry visitors were much more likely to be traveling for vacation/pleasure at 83 percent, with only 13 percent traveling to visit friends/relatives, and 4 percent for business-related purposes (including 2 percent for business/pleasure and 2 percent for business only).

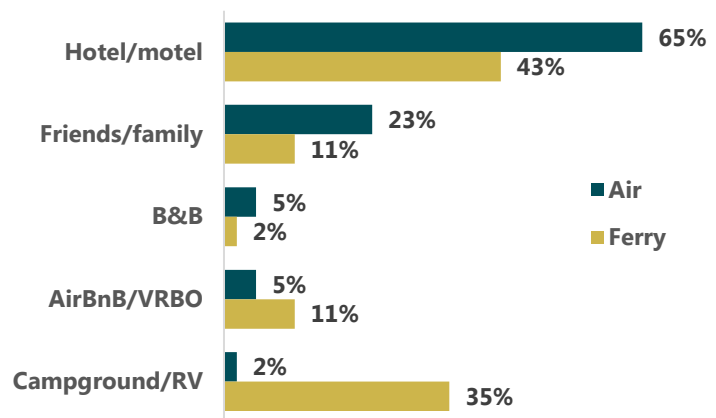
Juneau Trip Purpose, by Transportation Mode



## Lodging and Length of Stay

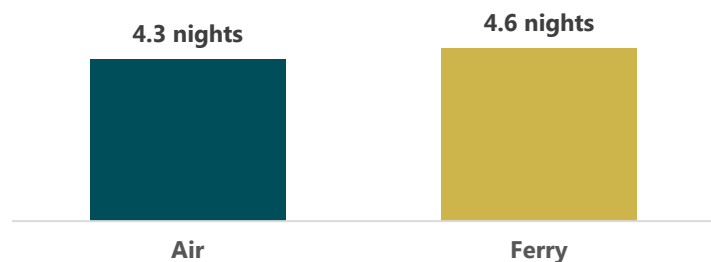
Air visitors were most likely to stay in a hotel/motel while in Juneau at 65 percent, followed by friends/family (23 percent), B&B and AirBnB/VRBO (both at 5 percent), and campground/RV (2 percent). As might be expected, lodging types differed significantly by trip purpose, with (for example) VFRs much more likely to stay with friends/family.

Top Five Lodging Types Used, by Transportation Mode



Ferry visitors also listed hotels/motels as their most frequent lodging type (43 percent) but were nearly equally likely to stay in a campground/RV (35 percent).

Average Length of Stay, by Transportation Mode

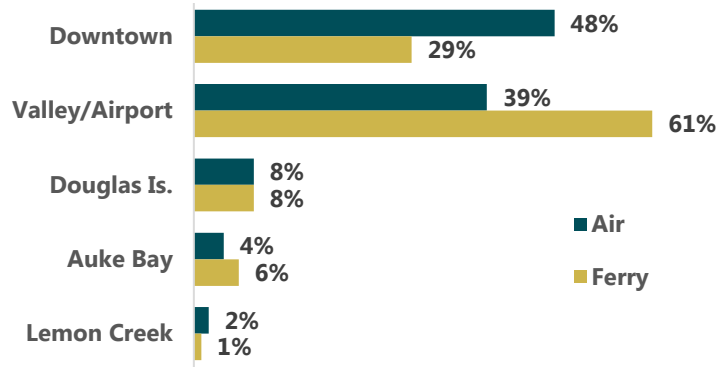


Air visitors reported spending an average of 4.3 nights in Juneau, while ferry visitors reported an average of 4.6 nights.

## Area of Stay

Air visitors were most likely to stay downtown (48 percent) or in the Valley/Airport area (39 percent). Ferry visitors were much more likely to stay in the Valley/Airport area (61 percent), and less likely to stay downtown (29 percent), when compared with air visitors. Less than 10 percent of each group reported staying in each of Juneau's other areas.

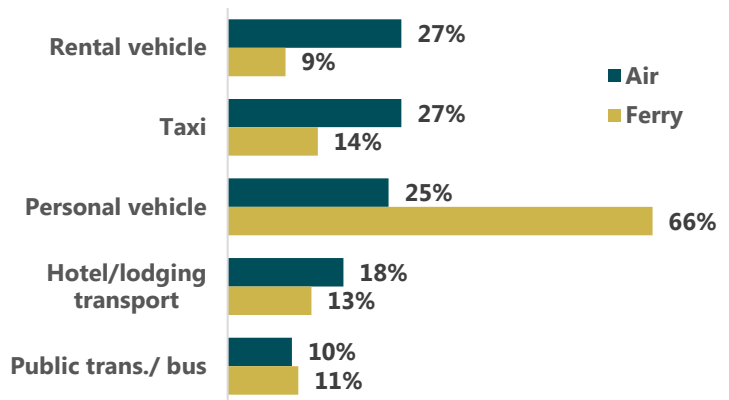
**Top Five Areas of Lodging, by Transportation Mode**



## Transportation Within Juneau

Air visitors reported using a wide variety of transportation methods to get around Juneau, most commonly rental vehicles (27 percent), taxis (27 percent), and personal vehicles (25 percent). Ferry visitors primarily used personal vehicles (66 percent); they were less likely than air visitors to use most other modes including taxis (14 percent), hotel/lodging transport (13 percent), and rental vehicles (9 percent).

**Top Five Transportation Methods Used in Juneau, by Transportation Mode**

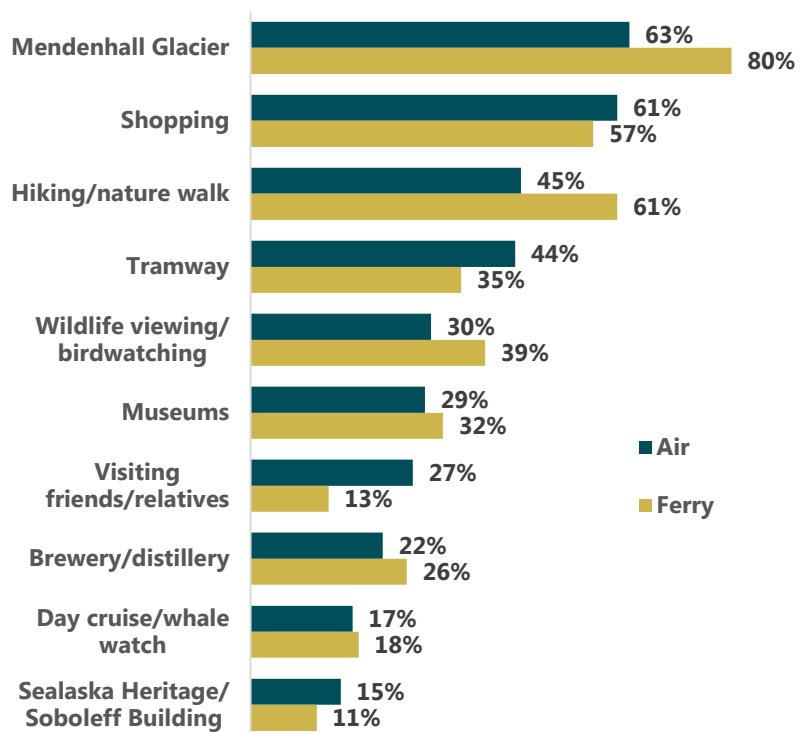


## Activities in Juneau

Air visitors' top activities in Juneau were Mendenhall Glacier (63 percent), shopping (61 percent), hiking/nature walk (45 percent), and tramway (44 percent). Among air visitors, participation rates differed by trip purpose: business visitors reported lower rates of participation for most activities. VFRs and vacation/pleasure visitors reported a wide variety of activities, although vacation/pleasure visitors were more likely to participate in paid tours such as a salmon bake.

Ferry visitors reported similar activities to air visitors, although they were more likely to visit the Mendenhall Glacier (80 versus 63 percent), and to go hiking or on a nature walk (61 versus 45 percent).

**Top Ten Juneau Activities, by Transportation Mode**



## Satisfaction Ratings

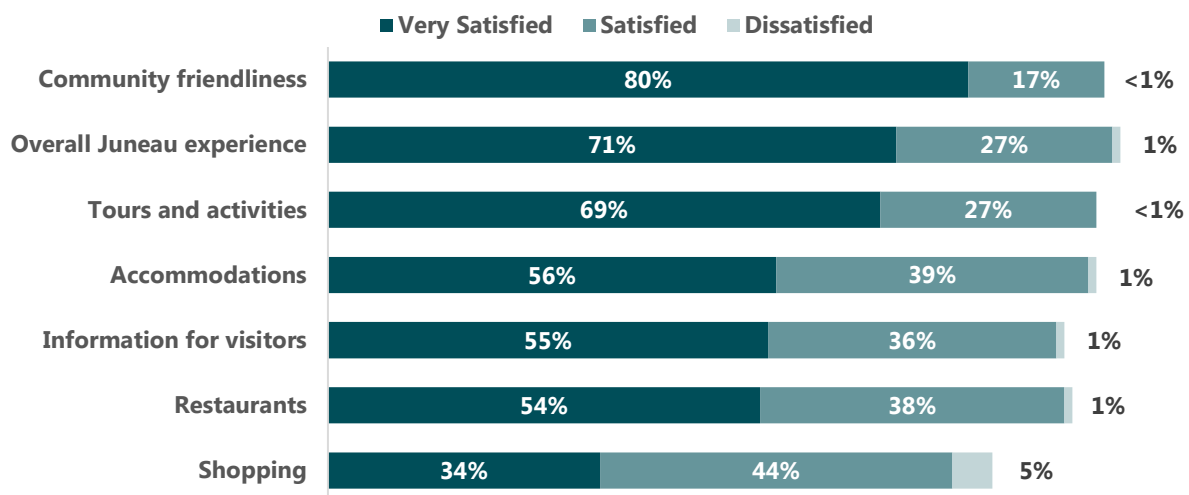
Juneau’s air visitors expressed generally high levels of satisfaction with their experience, with 5 percent or fewer dissatisfied with any individual category. Nearly all air visitors (98 percent) were either very satisfied (71 percent) or satisfied (27 percent) with their overall Juneau experience, and just 1 percent were dissatisfied.

The category with the highest level of satisfaction was community friendliness at 80 percent very satisfied. The category with the lowest satisfaction ratings was shopping, with just 34 percent very satisfied.

Ferry visitors reported similar satisfaction ratings as air visitors: 99 percent were satisfied with their overall Juneau experience, including 69 percent who were very satisfied and 30 percent who were satisfied. Seven percent or fewer were dissatisfied with any one category. Like air visitors, ferry visitors were most satisfied with community friendliness (75 percent very satisfied), and least satisfied with shopping (31 percent).

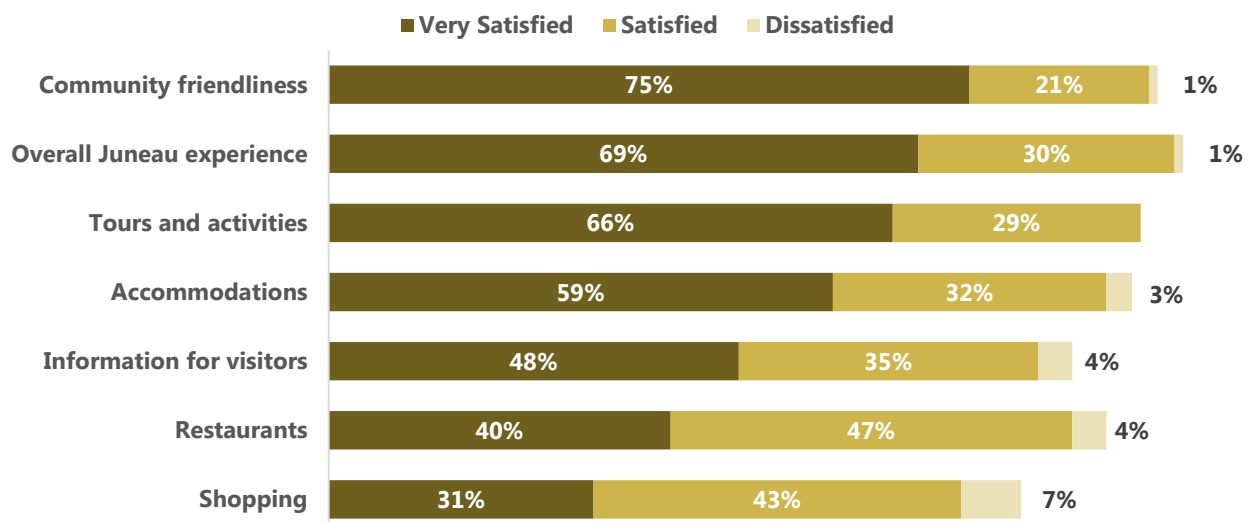
### Satisfaction with Juneau Experiences, Air Visitors

“Did not use” responses removed from base; excludes “neutral” responses



### Satisfaction with Juneau Experiences, Ferry Visitors

“Did not use” responses removed from base; excludes “neutral” responses.



## Trip Planning

The survey asked respondents a wide variety of questions regarding their trip planning behavior, timing, and information sources.

Both air and ferry visitors were highly likely to use the internet to plan their Juneau trip, at 81 and 82 percent, respectively. Nearly as many booked online, at 77 and 76 percent, respectively. Air visitors who booked online were most likely to book airfare at 94 percent, followed by lodging at 63 percent. Ferry visitors were most likely to book ferry tickets online at 93 percent, followed by lodging at 72 percent.

Air and ferry visitors reported using similar websites/apps (seen in chart at right), although ferry visitors were much more likely to have used the AMHS website, and air visitors were much more likely to have used airline websites.

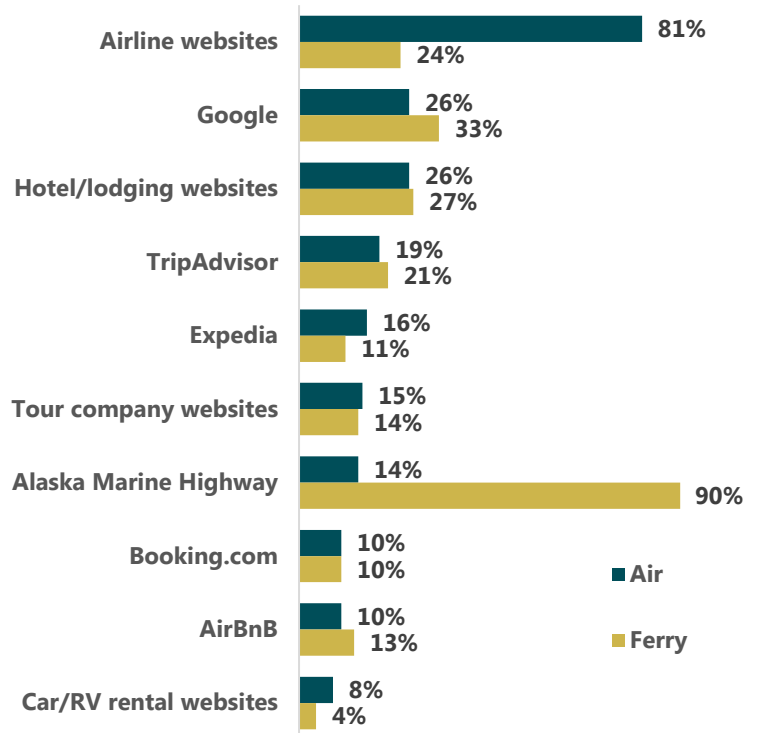
A separate question about Travel Juneau information sources revealed that 19 percent of air visitors and 26 percent of ferry visitors visited TravelJuneau.com, while 13 and 26 percent (respectively) used the Juneau Travel Guide and Planner.

Visitors were also asked about the information sources they used while in Juneau. Local residents were the number one source for both air and ferry visitors at 39 and 51 percent, respectively. Other popular sources included maps (28 and 31 percent), lodging staff (both at 28 percent), and brochure racks (19 and 24 percent). Ferry visitors were more likely than air visitors to cite the Visitor Center (22 versus 13 percent).

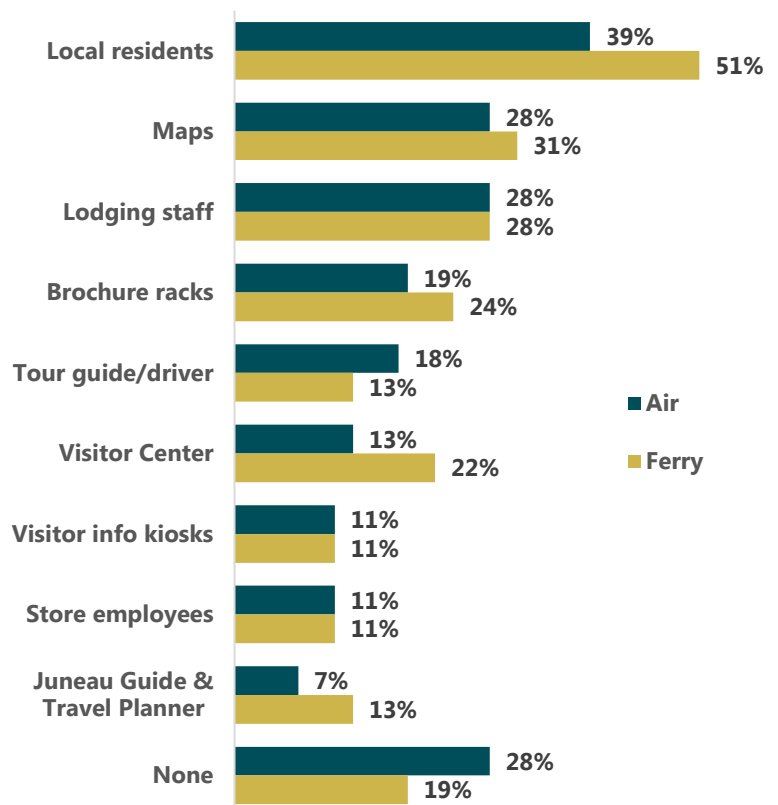
Air visitors were more likely than ferry visitors (28 versus 19 percent) to say they didn't use any information sources while in Juneau.

### Top Ten Websites/Apps Used to Plan Juneau Trip

Base: Used Internet to plan



### Top Ten Information Sources Used While in Juneau



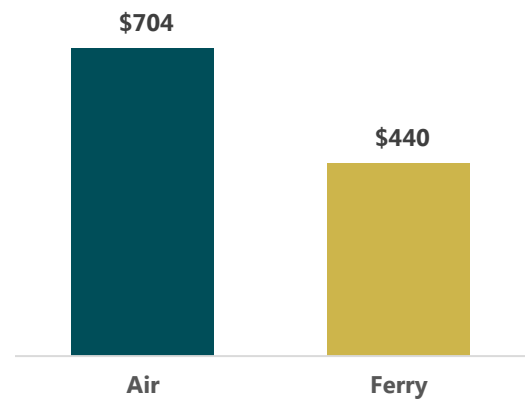
## Visitor Spending

Air visitors spent an average of \$704 per person in Juneau. Among air visitors, those traveling for vacation/pleasure reported the highest average spending (\$844), followed by business travelers (\$656), and VFRs (\$435). Ferry visitors spent an average of \$440 per person.

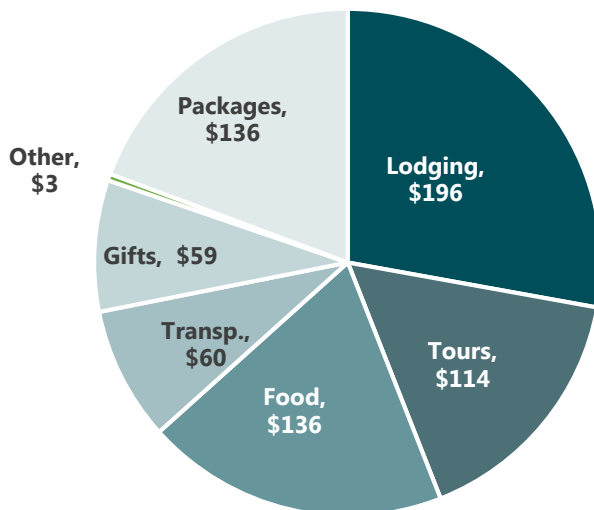
Average spending by category and transportation mode is shown in the charts below. Among air visitors, spending is largely concentrated in lodging (\$196), food/beverage (\$136), and tours/activities (\$114). Additional categories included transportation/ rental cars/fuel (\$60) and gifts/souvenirs/clothing (\$59). Air visitors also reported spending an average of \$136 per person on overnight packages; this average reflects the 9 percent of air visitors who purchased packages, applied to all visitors.

Ferry visitors' spending was concentrated in lodging (\$135), food/beverage (\$108), and tours/activities (\$103). The biggest differences between air and ferry visitors' spending was in lodging (\$196 among air visitors versus \$135 among ferry visitors) and packages – the number of ferry visitors who purchased overnight packages was negligible.

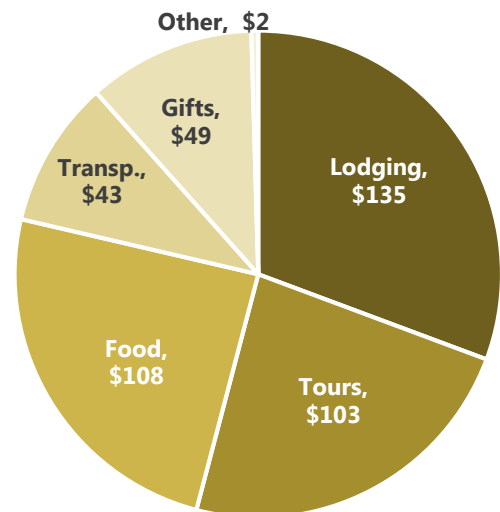
Average Per Person Spending in Juneau



Average Spending by Category, Air Visitors



Average Spending by Category, Ferry Visitors



## Estimated Visitor Volume

Juneau welcomed an estimated 1,229,100 out-of-state visitors between May and September of 2018, 94 percent of whom were cruise passengers; 5 percent air visitors; and 1 percent ferry visitors. Overall volume increased by 13 percent since 2016, the last time volume was measured. By market, cruise volume increased by 13 percent; air volume increased by 4 percent; and ferry volume decreased by 12 percent.

Juneau Visitor Volume, Summer 2018

	Visitors	% of Total
Cruise	1,151,100	94%
Air	63,000	5%
Ferry	15,000	1%
<b>Total</b>	<b>1,229,100</b>	<b>100%</b>



# Introduction and Methodology

## Introduction

Travel Juneau contracted with McDowell Group to conduct a survey of summer (non-cruise) visitors to Juneau in summer 2018. Surveys were conducted in the Juneau International Airport and the Alaska Marine Highway System terminal with out-of-state visitors who had spent at least one night in Juneau. Visitors provided information on their trip purpose, transportation modes both within Juneau and Southeast, activities, satisfaction, trip planning behavior, and demographics, among other subjects.

This survey has several distinct differences from the statewide survey conducted for the State of Alaska in summer 2016, the *Alaska Visitor Statistics Program 7 (AVSP)*. McDowell Group produced a report for Travel Juneau in 2017 based on those results, the *Juneau Visitor Profile and Economic Impact Study*. The summer 2018 survey differs from the summer 2016 survey in several important ways: respondents were intercepted in Juneau only (as opposed to throughout the state); day visitors (including cruise visitors) were excluded; a much larger ferry sample was achieved; and this survey incorporated a number of specific questions related to Juneau activities, lodging, and trip planning.

## Methodology

McDowell Group conducted intercept surveys with 728 non-cruise visitors between May and September 2018: 444 surveys in the airport and 284 surveys at the ferry terminal. To qualify for the survey, visitors had to be non-Alaska residents who spent at least one night in Juneau and were not returning to Juneau again on the same trip. Although the airport sample is referred to as “air visitors,” it does include small cruise ship passengers.

The sample plan was based on the known volume of flights and ferries, by month and by destination including north and southbound departures. The Juneau International Airport granted permission to survey in the boarding area. The Alaska Marine Highway System granted permission to survey in the terminal and the vehicle staging area. Trained McDowell Group surveyors approached randomly selected passengers.

The maximum margin of error at the 95 percent confidence level is  $\pm 4.6$  percent for the air visitor sample, and  $\pm 5.8$  percent for the ferry visitor sample.

**Table 1. Sample Sizes**

	Sample Size	Margin of Error
Air visitors	444	$\pm 4.6\%$
Ferry visitors	284	$\pm 5.8\%$
<b>Total</b>	<b>728</b>	<b>n/a</b>

Survey results are presented for air and ferry visitors separately. In turn, air visitor results are broken out by trip purpose (vacation/pleasure, visiting friends/relatives, and business), while ferry visitor results are shown by total and vacation/pleasure. The sample sizes of ferry visitors who were traveling for business or to visit friends/relatives were too small for analysis. Uncategorized (“other”) responses to open-ended questions are provided in the Appendix.

# Trip Purpose and Packages

## Juneau Trip Purpose

- Over one-half of air visitors (56 percent) were traveling to Juneau for vacation/pleasure; 25 percent to visit friends or relatives (VFR); 14 percent for business only; and 5 percent for business/pleasure.
- Ferry visitors were much more likely to be traveling for vacation/pleasure, at 83 percent, with 13 percent visiting friends/relatives and 4 percent on business. Subsequent tables show results for all ferry visitors as well as vacation/pleasure only; sample sizes for VFRs and business travelers are too small for analysis.

**Table 2. Trip Purpose (%)**

	Air n=444	Ferry n=284
Vacation/pleasure	56	83
Visiting friends or relatives	25	13
Business	14	2
Business and pleasure	5	2

## Packages

- Nine percent of air visitors purchased a multi-day package, including 15 percent of vacation/pleasure visitors, 2 percent of VFRs, and zero business travelers.
  - Among air visitors who purchased a package, about half (53 percent) purchased a fishing lodge package, 29 percent purchased a wilderness lodge package, and 18 percent purchased an adventure tour (such as hiking, trekking, or kayaking).
- Just 3 percent of ferry visitors purchased a multi-day package; the small sample size precludes analysis of package type.

**Table 3. Packages (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Purchased multi-day package	9	15	2	-	3	3
<b>Package type</b>	<b>n=38</b>	<b>n=36</b>				
Fishing lodge package	53	56	*	*	*	*
Wilderness lodge package	29	28	*	*	*	*
Adventure tour (hiking trekking, kayaking)	18	17	*	*	*	*

\*Sample size too small for analysis.

# Lodging, Length of Stay, and Getting Around Juneau

## Lodging

- Two-thirds of air visitors (65 percent) reported staying in a hotel/motel while in Juneau, while 23 percent stayed with friends or family. Air visitors were equally likely to have stayed in a B&B (5 percent) or Airbnb/VRBO (5 percent).
  - Lodging types varied widely by trip purpose, with vacation/pleasure and business travelers much more likely to stay in a hotel/motel (89 and 90 percent, respectively) compared with 21 percent of VFRs. VFRs tended to stay with friends and family (71 percent).
- Ferry visitors reported a wider variety of lodging types compared with air visitors: 43 percent stayed in a hotel/motel, 35 percent in a campground/RV, 11 percent with friends/family, and 11 percent in an Airbnb/VRBO.

**Table 4. Lodging Types Used in Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Hotel/motel	65	79	21	80	43	47
Friends/family	23	6	71	8	11	2
B&B	5	7	4	1	2	2
Airbnb/VRBO	5	6	4	4	11	12
Campground/RV	2	2	2	2	35	41
Boat/vessel	2	2	-	4	-	-
Lodge	1	2	-	1	-	-
Wilderness camping	<1	<1	-	1	1	1
Hostel	<1	<1	-	-	2	3
Other*	1	<1	-	4	3	3

Note: Percentages may add to more than 100 due to visitors using multiple lodging types.  
 \*\*"Other" responses are provided in the Appendix.

## Area of Stay

- Air visitors were most likely to report staying downtown (48 percent), followed by Mendenhall Valley/Airport (39 percent). Less than 10 percent of air visitors reported staying in each of the other areas.
  - Among air visitors, VFRs were much less likely to report staying downtown (18 percent), compared with 58 percent of vacation/pleasure and 56 percent of business travelers. Vacation/pleasure visitors also commonly stayed in the Mendenhall area (39 percent); only 9 percent reported other locations.
  - VFRs were most likely to stay in the Mendenhall Valley/Airport area (38 percent), followed by Douglas Island (23 percent), then downtown (18 percent).
- Ferry visitors were most likely to stay in the Mendenhall Valley/Airport area (61 percent), followed by downtown. Like air visitors, few ferry visitors reported staying in other areas.

**Table 5. Lodging Areas Used in Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Downtown	48	58	18	56	29	30
Mendenhall Valley/Airport	39	39	38	40	61	64
Douglas Island	8	3	23	-	8	4
Auke Bay	4	2	12	2	6	7
Lemon Creek	2	-	7	-	1	1
Out the Road	2	1	3	4	1	2
Thane	<1	-	1	1	-	-
Shelter Island	1	2	-	-	-	-
Don't know	1	<1	1	1	-	-

Note: Percentages may add to more than 100 due to visitors staying in multiple areas in Juneau.

## Length of Stay

- Air visitors spent an average of 4.3 nights in Juneau. They were most likely to stay one night (20 percent) or two nights (21 percent).
  - Among air visitors, VFRs reported the longest average length of stay at 6.9 nights, followed by business travelers at 4.5 nights, then vacation/pleasure visitors at 3.0 nights.
- Ferry visitors spent an average of 4.6 nights in Juneau, slightly longer than air visitors' average. They were about equally likely to stay one night (17 percent), two nights (20 percent), three nights (19 percent), and four nights (18 percent).
  - Ferry visitors traveling for vacation/pleasure reported a lower average length of stay, at 3.7 nights.

**Table 6. Length of Stay (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
1 night	20	28	5	19	17	16
2 nights	21	23	9	31	20	22
3 nights	14	15	9	20	19	22
4 nights	16	14	23	11	18	19
5 nights	7	6	12	2	5	5
6 nights	7	6	12	1	6	5
7 nights	5	4	4	5	5	5
8+ nights	10	3	26	11	10	8
<b>Average # of nights in Juneau</b>	<b>4.3</b>	<b>3.0</b>	<b>6.9</b>	<b>4.5</b>	<b>4.6</b>	<b>3.7</b>

## Getting Around Juneau

- Air visitors were about equally likely to use rental vehicles (27 percent), taxis (27 percent), and personal vehicles (25 percent) to get around Juneau, while slightly fewer visitors reported using hotel/lodging transport (18 percent) and public transportation/buses (10 percent).
  - Among air visitors, vacation/pleasure visitors reported a much wider variety of transportation types compared with other visitors: 34 percent used taxis, 27 percent used rental vehicles, 26 percent used hotel/lodging transport, and 16 percent used public transportation/buses. Business visitors reported the highest usage of rental vehicles (43 percent), while 19 percent reported using taxis. VFRs mostly relied upon personal vehicles to get around (75 percent), with 14 percent using rental vehicles and 10 percent using taxis.
- Ferry visitors relied heavily on personal vehicles to get around Juneau (66 percent), with less than 15 percent reporting using each of the other modes of transportation.

**Table 7. Modes of Transportation Used to Get Around Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=283	Vacation/ Pleasure n=236
Rental vehicle	27	27	14	43	9	10
Taxi	27	34	10	29	14	16
Personal vehicle	25	6	75	14	66	64
Hotel/lodging transport	18	26	3	15	13	13
Public transportation/bus	10	16	3	2	11	12
Uber/Lyft	7	9	3	6	4	4
Bicycle	<1	-	2	-	-	-
Other	-	-	-	-	-	-
Nothing	6	8	1	6	2	2

Note: Percentages may add to more than 100 due to visitors using multiple modes of transportation.

## Southeast Alaska Destinations

- Nearly one-half of air visitors (42 percent) reported having overnighted, or planning to overnight, in Southeast communities other than Juneau. Among these visitors, the most commonly visited communities were Sitka (29 percent), Ketchikan (23 percent), and Gustavus (15 percent). Nearly one-quarter (23 percent) reported overnighting onboard a vessel in unspecified locations.
  - Among air visitors who overnighted elsewhere in Southeast, vacation/pleasure visitors were most likely to visit Sitka (30 percent), Ketchikan (20 percent), and Skagway (14 percent). One-third (32 percent) reported overnighting onboard a vessel. Sample sizes for VFRs and business travelers preclude analysis of destinations.
- Three-quarters of ferry visitors (76 percent) reported traveling elsewhere in Southeast. Among these visitors, the most common destinations were Haines (53 percent), Skagway (41 percent), Ketchikan (35 percent), and Sitka (22 percent).

**Table 8. Other Southeast Alaska Destinations (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=283	Vacation/ Pleasure n=237
<b>Did you or will you spend any nights in Southeast Alaska, other than in Juneau?</b>						
Yes	42	54	29	24	76	79
No	58	46	71	76	24	21
<b>Where in Southeast?</b>						
	<b>n=185</b>	<b>n=133</b>			<b>n=215</b>	<b>n=187</b>
Sitka	29	30	*	*	22	24
Ketchikan	23	20	*	*	35	38
Gustavus	15	13	*	*	10	12
Petersburg	14	13	*	*	14	16
Skagway	13	14	*	*	41	40
Glacier Bay	10	8	*	*	5	5
Haines	8	8	*	*	53	52
Wrangell	5	6	*	*	9	10
Excursion Inlet	3	2	*	*	<1	1
Hoonah	3	2	*	*	4	4
Elfin Cove	2	2	*	*	-	-
Kake	2	1	*	*	-	-
Prince of Wales Island	1	1	*	*	3	4
Wilderness (anywhere)	1	1	*	*	<1	1
Onboard vessel	23	32	*	*	3	3
Other	3	3	*	*	1	2

\*Sample size too small for analysis.

## Getting Around Southeast Alaska

- Among air visitors who traveled elsewhere in Southeast Alaska, two-thirds (64 percent) reported using (jet) airplanes to get around the region; 20 percent used Alaska Marine Highway, 20 percent used small cruise ships; and 16 percent used small planes.
  - Vacation/pleasure visitors who traveled around Southeast were most likely to travel by jet airplane (61 percent), followed by small cruise ship (27 percent), Alaska Marine Highway (21 percent), and small plane (14 percent). Sample sizes among VFR and business travelers preclude analysis.
- Nearly all ferry visitors who traveled around Southeast reported using AMHS to get around the region; just 10 percent used a jet airplane, and 7 percent used a small plane.

**Table 9. Modes of Transportation Used in Southeast Alaska (%)**  
*(Base: Overnigheted somewhere else in Southeast Alaska)*

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=132	VFR n=31	Business n=20	Total Ferry n=283	Vacation/ Pleasure n=187
Airplane (jet)	64	61	68	80	10	11
Alaska Marine Highway	20	27	-	5	98	98
Small cruise ship	20	21	23	5	<1	1
Small plane	16	14	23	20	7	7
Charter vessel/yacht	5	5	6	10	-	-
Other ferry/water taxi	3	4	3	-	1	1
Other	2	1	3	5	-	-

Note: Percentages may add to more than 100 due to visitors using multiple modes of transportation.



## Activities in Juneau

- The most popular activities among air visitors were Mendenhall Glacier (63 percent), shopping (61 percent), hiking/nature walk (45 percent), and the Mt. Roberts Tramway (44 percent).
  - Air visitors' activities differed by trip purpose in a number of categories. Not surprisingly, VFRs were very likely to mention visiting friends/relatives as an activity. They were also more likely to report unguided fishing. Vacation/pleasure visitors were more likely to participate in viewing the Governor's Mansion, city/sightseeing tours, salmon bake, and kayaking/canoeing. Business visitors were most likely to report business as an activity, but they also participated in Mendenhall Glacier, shopping, and hiking/nature walk with some frequency.
- Ferry visitors' most popular activities were Mendenhall Glacier (80 percent), hiking/nature walk (61 percent), shopping (57 percent), wildlife viewing/birdwatching (39 percent), tramway (35 percent), and camping (35 percent).

**Table 10. Activities in Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=416	Vacation/ Pleasure n=230	VFR n=107	Business n=79	Total Ferry n=274	Vacation/ Pleasure n=231
Mendenhall Glacier	63	67	73	38	80	84
Shopping	61	67	68	33	57	57
Hiking/nature walk	45	50	51	23	61	61
Tramway	44	50	50	16	35	35
Wildlife viewing/birdwatching	30	33	34	14	39	45
Museums	29	36	29	10	32	34
Visiting friends/relatives	27	7	79	16	13	4
Brewery/distillery	22	22	30	13	26	26
Day cruise/whale watch	17	20	17	8	18	19
Sealaska Heritage/ Soboleff Building	15	17	19	5	11	12
Business	15	-	-	77	3	1
Historical/cultural attractions	13	15	13	5	20	23
Fishing (total)	13	12	20	4	8	7
Fishing (unguided)	8	5	18	3	7	6
Fishing (guided)	5	7	2	3	1	1
Governor's Mansion	10	14	7	4	16	18
City/sightseeing tours	10	13	7	3	16	18
Salmon Bake	9	13	8		8	8
Kayaking/canoeing	9	12	6	5	7	8
Flightseeing	9	11	10		7	8

Native cultural tours/activities	8	9	9	4	5	6
Biking	6	7	7		7	8
Shrine	5	6	6	3	6	7
Russian Church	5	7	2	1	11	13
Hatchery	5	6	5	1	6	6
Gold panning/mine tour	5	6	6	-	7	8
Ice trekking	3	4	3	-	3	3
Camping	3	3	3	3	35	39
Glacier Gardens	2	3	1	-	3	4
Dog sledding	2	2	3	-	1	1
Food tour	1	1	-	1	1	1
Rafting	<1	<1	1	-	1	1
Northern lights viewing	-	-	-	-	1	1
Other	3	5	2	-	1	1

## Missed Activities

The question on activities was followed by a question asking visitors which activities they would have liked to do in Juneau but didn't get a chance to. (See table, next page.)

- Air visitors most commonly cited Northern Lights viewing (18 percent), followed by fishing (16 percent), tramway (12 percent), Mendenhall Glacier (11 percent), and hiking/nature walk (11 percent).
  - Among air visitors, VFRs tended to mention fewer missed activities. Vacation/pleasure visitors were the most likely to cite Northern Lights at 23 percent, compared with business at 17 percent and VFRs at 8 percent. Business visitors were more likely than vacation/pleasure visitors or VFRs to cite hiking/nature walk (18 percent, versus 10 and 5 percent, respectively) and flightseeing (14 percent, versus 9 and 5 percent).
- Ferry visitors' most common "missed" activities were Northern Lights viewing (14 percent), kayaking/canoeing (11 percent), and day cruise/whale watch (10 percent).

The most common response among both air and ferry visitors was "none." Forty percent of air visitors said there were no activities they regretted missing out on (including 33 percent of vacation/pleasure visitors, and 49 percent of both VFRs and business visitors), along with 41 percent of ferry visitors.

**Table 11. What activities would you have liked to do in Juneau, that you didn't get a chance to? (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Northern Lights viewing	18	23	8	17	14	15
Fishing	16	15	16	18	9	10
Guided	11	12	8	15	7	8
Unguided	7	5	12	6	3	3
Tramway	12	15	10	8	8	8
Mendenhall Glacier	11	13	5	12	4	4
Hiking/nature walk	11	10	5	18	5	4
Kayaking/canoeing	10	10	7	12	11	11
Flightseeing	9	9	5	14	5	6
Museums	9	10	7	7	6	6
Day cruise/while watch	8	10	4	7	10	11
Wildlife viewing/ birdwatching	8	9	3	10	6	6
Ice trekking	7	7	6	8	5	6
Brewery/distillery	7	8	4	6	4	4
Rafting	6	6	5	7	4	4
Biking	5	4	8	6	4	4
Gold panning/mine tour	5	5	5	5	6	5
Native cultural tours/activities	5	4	4	8	4	3
Camping	5	3	7	5	4	3
Russian Church	4	4	2	6	4	3
Historical/cultural attractions	4	4	2	6	4	3
Food tour	3	4	2	5	2	2
Hunting	3	4	2	1	1	1
Salmon Bake	3	3	3	4	2	2
City/sightseeing tours	2	3	-	2	1	<1
Governor's Mansion	2	3	1	1	2	2
Shopping	2	1	2	2	1	1
Hatchery	1	1	2	-	<1	<1
Dog sledding	1	2	-	-	1	1
Business	1	1	1	1	-	-
Shrine	1	1	2	-	1	<1
Sealaska Heritage/ Soboleff Building	<1	1	-	-	1	2
Visiting friends/relatives	<1	1	-	-	<1	<1
Glacier Gardens	<1	1	-	-	1	1
Other	5	7	5	1	7	7
None	40	33	49	49	41	38

# Satisfaction and Return Travel

## Satisfaction with Overall Experience

- Air visitors reported high levels of satisfaction with their overall Juneau experience, including 71 percent who were very satisfied, and 27 percent who were satisfied; less than 2 percent were dissatisfied.
  - Among air visitors, VFRs reported higher satisfaction ratings, with 84 percent very satisfied, compared with 67 percent of vacation/pleasure and 68 percent of business travelers.
- Ferry visitors reported very similar satisfaction ratings as air visitors, with 69 percent very satisfied and 30 percent satisfied, and just 1 percent dissatisfied.

**Table 12. Satisfaction with Overall Juneau Experience (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Very satisfied	71	67	84	68	69	67
Satisfied	27	31	15	30	30	32
Neutral	1	2	1	1	-	-
Dissatisfied	1	<1	-	1	1	<1
Very dissatisfied	<1	<1	-	-	-	-

## Satisfaction with Specific Categories

The table on the following pages shows satisfaction ratings among those that rated each category; those that responded that they didn't use a particular category were removed from the base. The tables also show the percentage of each sample that fell into the "did not use" category, out of all respondents.

- Satisfaction ratings for individual aspects of the Juneau experience were generally positive among air visitors, with 1 percent or fewer reporting dissatisfaction in most categories. Satisfaction was highest for community friendliness at 80 percent very satisfied, followed by tours/activities (69 percent), accommodations (56 percent), visitor information (55 percent), restaurants (54 percent), and shopping (34 percent).
  - The largest difference in satisfaction among air visitors was for accommodations, where 71 percent of VFRs were very satisfied, compared with 51 percent of both vacation/pleasure and business travelers. This presumably reflects the tendency of VFRs to stay with their friends and family while in town.
- Ferry visitors tended to give similar satisfaction ratings as air visitors, with one exception: they were less satisfied with restaurants (40 percent very satisfied, versus 54 percent among air visitors).

**Table 13. Satisfaction with Specific Categories (%)**  
 "Did not use" removed from Base for Satisfaction Ratings

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
<b>Community friendliness</b>						
Very satisfied	80	79	82	80	75	74
Satisfied	17	17	16	20	21	22
Neutral	2	3	1	-	1	2
Dissatisfied	<1	<1	-	-	1	<1
Very dissatisfied	-	-	-	-	<1	<1
Did not use	-	-	-	-	-	-
<b>Tours and activities</b>						
Very satisfied	69	67	73	73	66	66
Satisfied	27	30	23	15	29	30
Neutral	4	2	3	12	3	3
Dissatisfied	<1	<1	-	-	-	-
Very dissatisfied	-	-	-	-	-	-
Did not use	21	11	19	51	11	9
<b>Accommodations</b>						
Very satisfied	56	51	71	51	59	57
Satisfied	39	43	25	46	32	34
Neutral	3	4	4	2	7	8
Dissatisfied	1	2	-	-	3	1
Very dissatisfied	<1	<1	-	-	-	-
Did not use	<1	<1	1	-	1	1
<b>Information for visitors</b>						
Very satisfied	55	54	56	55	48	49
Satisfied	36	37	28	39	35	35
Neutral	8	8	10	6	12	11
Dissatisfied	1	1	-	-	3	3
Very dissatisfied	<1	-	3	-	1	1
Did not use	45	30	65	63	31	23
<b>Restaurants</b>						
Very satisfied	54	53	57	53	40	42
Satisfied	38	38	36	38	47	48
Neutral	7	8	6	8	8	7
Dissatisfied	1	2	1	1	3	2
Very dissatisfied	-	-	-	-	1	<1
Did not use	6	4	8	7	12	13
<b>Shopping</b>						
Very satisfied	34	30	37	49	31	33
Satisfied	44	46	44	31	43	42
Neutral	17	17	15	17	18	18
Dissatisfied	5	7	3	3	6	6
Very dissatisfied	-	-	-	-	1	1
Did not use	32	29	19	58	25	25

# Recommending Juneau

- Two-thirds of Juneau air visitors (66 percent) said they were very likely to recommend Juneau as a vacation destination, while another 27 percent said they were likely to do so. Just 3 percent were unlikely.
  - Among air visitors, VFRs were more likely to recommend Juneau, corresponding with their higher overall satisfaction rates: 83 percent were very likely, compared with 61 percent of vacation/pleasure and 58 percent of business travelers.
- Ferry visitors gave similar ratings as air visitors, with 65 percent very likely to recommend Juneau, and 29 percent likely to do so.

**Table 14. Likelihood of Recommending Juneau to Others as a Vacation Destination (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Very likely	66	61	83	58	65	66
Likely	27	31	13	36	29	28
Unlikely	2	3	1	1	3	3
Very unlikely	1	1	-	1	1	1
Don't know	4	4	2	4	2	2

# Previous Juneau Travel

- Nearly half (46 percent) of air visitors had been to Juneau before, ranging from 27 percent among vacation/pleasure visitors, to 68 percent among VFRs, and 75 percent among business travelers.
- Ferry visitors were more likely to be on their first trip to Juneau at 71 percent.

**Table 15. Previous Juneau Travel (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
First trip to Juneau	54	73	32	25	71	78
Been to Juneau before	46	27	68	75	29	22

## Returning to Juneau

- Over one-third of air visitors said they were very likely to visit Juneau in the next five years, while another 24 percent said this was likely (62 percent total).
  - Business travelers were much more likely to say they were very likely to return to Juneau: 76 percent, compared with 49 percent of VFRs and 21 percent of vacation/pleasure visitors.
- Ferry visitors were less likely than air visitors to say they were very likely (19 percent) or likely (23 percent) to visit Juneau in the next five years (42 percent total).

**Table 16. Likelihood to Return to Juneau in Next Five Years (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Very likely	38	21	49	76	19	16
Likely	24	23	32	19	23	20
Unlikely	20	29	13	2	32	35
Very unlikely	12	21	1	-	19	22
Don't know	5	7	4	2	6	8

## Importance of Sources

Visitors were asked to rate the importance of six different planning activities in making their decision to visit Juneau.

- Air visitors rated talking to friends/family as by far the most important planning activity, with 38 percent saying this was very important, and another 18 percent saying it was somewhat important (56 percent total). This was followed by reading a guidebook (28 percent very/somewhat important); reading an article (24 percent); online advertisement (21 percent); newspaper/magazine advertisement (16 percent); and TV show (14 percent).
  - Among air visitors, VFRs were much more likely to rate friends/family as important (74 percent very/somewhat important, versus 48 percent among vacation/pleasure and 55 percent among business travelers). Vacation/pleasure visitors were much more likely than VFRs to rate all other sources as important; for example, 37 percent gave very/somewhat important ratings to guidebooks, compared with 15 percent of VFRs and zero business travelers.
- Ferry visitors gave fairly similar ratings to air visitors, with a couple of exceptions: they were less likely to rate friends/family as important (42 percent important, versus 56 percent among air visitors); and they were more likely to rate guidebooks as important (50 percent important, versus 28 percent among air visitors).

**Table 17. Importance of Planning Activities in Making Decision to Visit Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=380	Vacation/ Pleasure n=248	VFR n=112	Business n=20	Total Ferry n=277	Vacation/ Pleasure n=236
<b>Talked to friends or family about Juneau</b>						
Very important	38	32	53	35	27	26
Somewhat important	18	16	21	20	15	14
Not important	18	17	18	30	19	18
Did not use	24	33	8	10	37	41
Don't know/refused	2	2	1	5	2	1
<b>Read a guidebook about Juneau</b>						
Very important	16	24	3	-	23	28
Somewhat important	12	13	12	-	17	18
Not important	25	21	32	35	21	18
Did not use	45	41	53	60	36	36
Don't know/refused	2	2	1	5	2	1
<b>Read an article about Juneau</b>						
Very important	14	21	2	-	13	16
Somewhat important	10	10	13	-	14	15
Not important	28	23	33	55	16	11
Did not use	47	45	52	40	54	56
Don't know/refused	1	1	1	5	2	2



<b>Saw an advertisement online about Juneau</b>						
Very important	11	15	3	5	10	12
Somewhat important	10	12	6	5	10	10
Not important	25	21	34	35	14	11
Did not use	52	51	56	50	63	66
Don't know/refused	2	2	1	5	2	2
<b>Saw an advertisement in a newspaper or magazine</b>						
Very important	8	12	1	-	7	8
Somewhat important	8	8	9	-	8	8
Not important	30	26	37	40	16	12
Did not use	53	52	53	55	68	71
Don't know/refused	2	2	1	5	2	1
<b>Saw a TV show about Juneau</b>						
Very important	8	13	1	-	8	9
Somewhat important	6	6	7	-	8	7
Not important	27	21	38	40	14	9
Did not use	57	58	54	55	69	73
Don't know/refused	1	1	1	5	2	1

Note: Business-only travelers were screened from answering this question.

## Planning Timeline

Visitors were asked how many months ahead of their trip they decided to travel to Juneau, and how many months ahead they made their major travel arrangements. These results were combined with the month the survey was conducted to determine the exact planning time period, by quarter.

- Air visitors reported making their trip decision an average of 6.6 months ahead of time and booking an average of 4.6 months ahead of time. The most common quarter for their trip decision was January-March (29 percent), while the most common quarter for trip booking was April-May (31 percent).
  - Among air visitors, vacation/pleasure visitors made their trip decision much further ahead of time at an average of 8.3 months, compared with 5.8 months among VFRs and 2.5 months among business travelers. Likewise, vacation/pleasure made their arrangements much further ahead of time at 6.0 months ahead, on average, compared with 3.8 months among VFRs and 1.5 months among business travelers.
- Compared with air visitors, ferry visitors reported a slightly longer time period since their trip decision: 7.1 months, compared with 6.6 months among air visitors. However, they reported a slightly shorter time period since their trip booking: 3.9 months, compared with 4.6 months among air visitors.

**Table 18. Trip Planning Timeline by Number of Months (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
<b>How far in advance did you decide to come on this trip to Juneau?</b>						
Before July 2017	13	18	8	2	13	14
July-Sept 2017	14	19	11	4	17	19
Oct-Dec 2017	14	18	10	6	15	14
Jan-Mar 2018	29	28	40	15	25	25
Apr-Jun 2018	19	12	21	36	18	16
July-Sept 2018	13	5	11	37	13	12
<b>Average # of months</b>	<b>6.6</b>	<b>8.3</b>	<b>5.8</b>	<b>2.5</b>	<b>7.1</b>	<b>7.5</b>
<b>How far in advance did you book your major travel arrangements?</b>						
Before July 2017	4	6	1	-	<1	<1
July-Sept 2017	9	15	2	1	4	4
Oct-Dec 2017	12	17	9	2	16	18
Jan-Mar 2018	30	33	39	6	30	31
Apr-Jun 2018	31	21	38	50	27	24
July-Sept 2018	15	8	11	40	22	22
<b>Average # of months</b>	<b>4.6</b>	<b>6.0</b>	<b>3.8</b>	<b>1.5</b>	<b>3.9</b>	<b>4.1</b>

## Internet Usage

- Four out of five air visitors (81 percent) reported using the internet to plan and/or book their Juneau trip, including 77 percent who booked at least one trip component online.
  - Among air visitors, vacation/pleasure visitors and VFRs had higher internet usage rates (85 and 89 percent, respectively), compared with business travelers (58 percent). Likewise, internet booking rates were higher among vacation/pleasure visitors and VFRs (82 and 88 percent), compared with business travelers (50 percent).
- Compared with air visitors, ferry visitors were equally likely to use the internet at 82 percent, and about as likely to book online at 76 percent.

**Table 19. Usage of Internet or Apps for Trip Planning/Booking (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Used internet	81	85	89	58	82	82
Booked online	77	82	88	50	76	76
Did not use internet	18	14	10	39	16	16
Don't know	2	2	1	2	2	2

- Among air visitors who booked online, nearly all (94 percent) used it to book airfare. Air visitors also booked lodging (63 percent), vehicle rental (19 percent), tours (14 percent), ferry (10 percent), cruise (7 percent), and overnight packages (1 percent) online.
  - Among air visitors booking online, the particular trip components booked online varied according to trip purpose. Vacation/pleasure visitors showed higher rates of booking online for most components; for example, 81 percent booked their lodging online, compared with 64 percent of business travelers, and just 24 percent of VFRs.
- Ferry visitors who booked online were highly likely to book their ferry online (93 percent); they were also likely to book their lodging online (72 percent).

**Table 20. Trip Components Booked Online, Including via Apps (%)**

*(Base: Booked any trip component online)*

	AIR VISITORS				FERRY VISITORS	
	Total Air n=344	Vacation/ Pleasure n=203	VFR n=99	Business n=42	Total Ferry n=215	Vacation/ Pleasure n=180
Airfare	94	93	96	100	27	26
Lodging	63	81	24	64	72	78
Vehicle rental	19	23	8	21	4	4
Tours	14	22	2	2	15	18
Ferry	10	13	7	-	93	92
Cruise	7	11	-	-	<1	1
Overnight packages	1	1	-	-	<1	1

## Websites/Apps

Visitors were shown a list of websites and apps, and asked which of them were a) used to plan their Juneau trip and b) used to book their Juneau trip. The following page shows the sites used to plan, while the subsequent page shows the sites used to book.

- Among air visitors who used the internet (or apps) to plan their Juneau trip, the most common type of site used for *planning* was airline websites (81 percent), followed by Google and hotel/lodging websites (both at 26 percent), Trip Advisor (19 percent), and Expedia (16 percent).
  - Among air visitors using websites or apps to plan their trip, vacation/pleasure visitors showed higher rates of usage of most sites. For example, 36 percent of vacation/pleasure visitors (who planned online) cited hotel/lodging websites, compared with 20 percent of business travelers and 6 percent of VFRs.
- Ferry visitors who planned online were most likely to cite the AMHS website (90 percent), followed by Google (33 percent), hotel/lodging websites (27 percent), and airline websites (24 percent).
- In terms of booking, air visitors most commonly cited airlines websites (79 percent), followed by hotel/lodging websites (22 percent) and tour company websites (11 percent).
  - As with planning, vacation/pleasure visitors were more likely to cite a variety of websites, when compared to VFRs and business travelers. For example, 31 percent booked via hotel/lodging websites, compared with 19 percent of business travelers and 4 percent of VFRs.
- Nearly all ferry visitors (85 percent) who used the internet to plan or book their trip said they booked through the AMHS website. Ferry visitors also commonly booked through hotel/lodging websites (24 percent) and airline websites (23 percent).

**Table 21. Top Websites/Apps Used to Plan (%)**  
*(Base: Used the internet to plan/book any portion of Juneau trip)*

	AIR VISITORS				FERRY VISITORS	
	Total Air n=359	Vacation/ Pleasure n=210	VFR n=100	Business n=49	Total Ferry n=233	Vacation/ Pleasure n=195
Airline websites	81	76	90	80	24	22
Google	26	33	14	22	33	36
Hotel/lodging websites	26	36	6	20	27	29
Trip Advisor	19	28	7	6	21	23
Expedia	16	22	6	10	11	12
Tour company websites	15	23	5	-	14	17
Alaska Marine Highway	14	16	15	2	90	89
Booking.com	10	14	5	4	10	12
Airbnb	10	12	7	4	13	14
Car/RV rental websites	8	10	7	6	4	4
AAA.com	8	14	-	-	10	11
Hotels.com	8	10	3	10	7	8
Orbitz	8	11	4	2	6	7
Travelocity	7	9	5	6	9	9
Cruise line websites	6	11	-	-	2	2
TravelAlaska.com	6	9	3	2	9	10
Priceline	6	8	2	4	5	6
Yelp	6	8	2	4	6	7
Kayak.com	5	6	4	2	3	3
Facebook	3	3	3	6	4	5
Alaska App	3	3	2	4	5	6
Hotwire	3	4	1	-	3	4
Costco.com	3	3	2	2	2	2
VRBO	3	2	2	4	2	3
Instagram	2	3	-	2	1	2
LonelyPlanet.com	2	3	-	-	5	6
Alaska.org	2	3	-	-	1	1
Hipmunk	1	1	-	-	-	-
HotelTonight	<1	<1	-	-	1	1
Recreation.gov	<1	<1	-	-	4	5
Twitter	-	-	-	-	1	2
Other	7	9	3	10	9	11
Don't know	1	1	-	-	1	2

**Table 22. Top Websites/Apps Used to Book (%)**  
*(Base: Used the internet to plan/book any portion of Juneau trip)*

	AIR VISITORS				FERRY VISITORS	
	Total Air n=355	Vacation/ Pleasure n=207	VFR n=100	Business n=48	Total Ferry n=226	Vacation/ Pleasure n=189
Airline websites	79	76	88	77	23	22
Hotel/lodging websites	22	31	4	19	24	26
Tour company websites	11	17	2	-	10	12
Alaska Marine Highway	9	12	8	-	85	84
Expedia	8	10	5	10	6	6
Booking.com	8	11	3	2	7	8
Car/RV rental websites	7	7	6	6	2	2
Hotels.com	6	6	3	10	4	4
AirBnB	5	6	5	-	11	12
Cruise line websites	5	8	1	-	-	-
AAA.com	4	7	-	-	3	4
Orbitz	4	5	2	2	2	2
Priceline	3	4	1	4	<1	1
Google	3	3	2	4	4	4
Kayak.com	2	3	1	2	1	2
Travelocity	2	2	1	4	2	2
Costco.com	1	1	1	2	-	-
VRBO	1	1	-	4	1	1
Alaska App	1	<1	1	2	<1	1
Trip Advisor	1	1	-	-	1	1
Hotwire	1	1	-	-	-	-
HotelTonight	<1	<1	-	-	-	-
Facebook	-	-	-	-	-	-
Hipmunk	-	-	-	-	-	-
Instagram	-	-	-	-	-	-
LonelyPlanet.com	-	-	-	-	-	-
TravelAlaska.com	-	-	-	-	1	1
Twitter	-	-	-	-	-	-
Yelp	-	-	-	-	-	-
Recreation.gov	-	-	-	-	-	-
Alaska.org	-	-	-	-	4	5
Other	3	2	2	6	3	4
Don't know	3	2	1	13	4	4

## Travel Agent Usage

- Twelve percent of air visitors and 6 percent of ferry visitors booked at least one component of their trip through a travel agent.
- Among air visitors who used a travel agent, the most common component booked was airfare (85 percent), followed by lodging (64 percent), tours and cruise (both at 26 percent), vehicle rental (11 percent), and ferry and overnight packages (both at 8 percent). Sample sizes for ferry visitors and by trip purpose were too small for analysis.

**Table 23. Travel Agent Usage for Trip Planning/Booking (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Booked through travel agent	12	16	4	12	6	7
Did not book through travel agent	87	84	96	87	93	92
Don't know	<1	-	-	1	1	1

**Table 24. Trip Components Booked through a Travel Agent (%)**

*(Base: Booked through travel agent)*

	Air n=53
Airfare	85
Lodging	64
Tours	26
Cruise	26
Vehicle rental	11
Ferry	8
Overnight packages	8

## Usage of Travel Juneau Information Sources

Visitors were asked specifically about four information sources promoted by Travel Juneau. When asking about the Juneau Travel Guide and Planner, surveyors showed respondents the cover of the planner to maximize recall.

- Among air visitors, 19 percent said they visited TravelJuneau.com; 13 percent used the Juneau Travel Guide; 2 percent contacted Travel Juneau ahead of their trip; and less than 1 percent used the Travel Juneau App while in Juneau.
  - Among air visitors, vacation/pleasure visitors were much more likely to use Travel Juneau Sources. For example, 29 percent visited TravelJuneau.com, compared with 7 percent of VFRs and 4 percent of business travelers.
- Ferry visitors reported higher usage of all four Travel Juneau sources, compared with air visitors. One-quarter (26 percent) visited TravelJuneau.com, while the same number used the Juneau Travel Guide. Four percent contacted Travel Juneau, and 4 percent used the Travel Juneau App while in Juneau.

**Table 25. Usage of Travel Juneau Information Sources (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Visited TravelJuneau.com	19	29	7	4	26	28
Used Juneau Travel Guide and Planner	13	17	10	5	26	30
Contacted Travel Juneau ahead of trip	2	4	-	-	4	5
Used Travel Juneau App while in Juneau	<1	1	-	-	4	4



## Usage of Other Information Sources

Visitors were asked about other information sources used to plan their Juneau trip, besides the aforementioned internet, apps, travel agents, and Travel Juneau sources.

- Among air visitors, the most common “other” source was friends/family/co-workers (61 percent), followed by prior experience (40 percent). All other sources were mentioned by fewer than 10 percent of visitors.
  - Air visitors’ sources varied significantly by trip purpose. VFRs and business travelers were more likely to cite friends/family/co-workers at 88 percent and 71 percent, respectively, compared with 46 percent of vacation/pleasure visitors. These two groups were also more likely to cite prior experience at 61 percent each, compared with 24 percent of vacation/pleasure visitors. Vacation/pleasure visitors were more likely to cite all other sources, however.
- Ferry visitors reported a much wider variety of other information sources compared with air visitors. They were most likely to cite friends/family/co-workers (42 percent), followed by prior experience (30 percent), Milepost (28 percent), and other travel guide/book (21 percent).

**Table 26. Usage of Other Information Sources (Not Including Online/Travel Agent/TJ Sources) (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Friends/family/co-workers	61	46	88	71	42	39
Prior experience	40	24	61	61	30	23
Other travel guide/book	9	16	2	1	21	25
AAA	8	14	2	-	13	15
Hotel/lodge	6	9	3	4	3	4
Brochures	5	7	3	2	10	11
Tour company	5	8	1	1	3	3
Television	5	8	1	-	2	3
Ferry brochure/schedule	5	6	3	1	16	18
Cruise line	3	6	-	-	-	-
Magazine	3	4	2	-	4	4
Newspaper	2	2	2	-	1	1
<i>Milepost</i>	1	2	-	1	28	32
North to Alaska Guide	1	2	-	-	5	5
Community brochures	1	1	2	-	2	3
Club/organization/church	1	1	-	1	1	1
Library	<1	<1	-	-	2	2
Travel/recreation exhibitions	<1	<1	-	-	-	-
Bell’s Travel Guide	-	-	-	-	5	5
Other	<1	<1	-	-	<1	<1
None	11	17	4	6	14	14
Don’t know	1	1	2	1	1	1

## Sources Used in Juneau

Visitors were asked about information sources used while in Juneau.

- Among air visitors, the most common information source while in Juneau was local residents (39 percent) followed by maps and lodging staff (each at 28 percent) and brochure racks (19 percent). In terms of Travel Juneau sources, 13 percent cited the Visitor Center, 11 percent cited visitor information kiosks, and 7 percent cited the Juneau Guide.
  - Among air visitors, vacation/pleasure visitors tended to report higher uses of most sources. For example, 41 percent mentioned lodging staff, compared with 13 percent of business travelers and 10 percent of VFRs.
- Ferry visitors reported similar usage rates as air visitors, with a couple of exceptions. They were more likely to use local residents (51 percent, compared with 39 percent of air visitors) and the Visitor Center (22 versus 13 percent).

**Table 27. Usage of Other Information Sources, While in Juneau (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Local residents	39	38	46	31	51	52
Maps	28	38	14	18	31	35
Lodging staff	28	41	10	13	28	32
Brochure racks	19	27	10	7	24	27
Tour guide/driver	18	27	6	7	13	14
Visitor Center	13	21	4	2	22	25
Visitor info kiosks	11	17	4	4	11	14
Store employees	11	14	10	5	11	13
Juneau Guide & Travel Planner	7	9	4	4	13	15
Other	<1	<1	-	-	1	1
None	28	15	44	49	19	14
Don't know/refused	<1	<1	1	-	<1	<1

## Origin

- Nine out of ten air visitors were from the U.S., most commonly the West (54 percent), followed by the South (14 percent), the Midwest (13 percent), and the East (9 percent). In the U.S., the most common states of origin were Washington (17 percent), California (13 percent), and Oregon (5 percent).
  - VFRs and business travelers were more likely to be from the West at 63 and 64 percent, respectively, compared with vacation/pleasure visitors at 46 percent. Vacation/pleasure visitors were more likely to be from the Midwest (17 percent versus 12 percent of VFRs and 5 percent of business travelers) and from international countries (11 percent versus 2 percent of VFRs and business travelers).
- Ferry visitors resembled air visitors in their region/country origin, with two exceptions. They were less likely to be from the West (42 versus 54 percent) and much more likely to be from Canada (14 versus 2 percent).

**Table 28. Origin (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
<b>United States</b>	<b>91</b>	<b>88</b>	<b>96</b>	<b>94</b>	<b>75</b>	<b>72</b>
<b>Western US</b>	<b>54</b>	<b>46</b>	<b>63</b>	<b>64</b>	<b>42</b>	<b>41</b>
Washington	17	9	20	38	9	8
California	13	14	13	11	12	13
Oregon	5	4	6	6	4	4
<b>Southern US</b>	<b>14</b>	<b>16</b>	<b>12</b>	<b>13</b>	<b>13</b>	<b>12</b>
Florida	4	4	4	2	2	2
Texas	4	6	2	2	5	5
<b>Midwestern US</b>	<b>13</b>	<b>17</b>	<b>12</b>	<b>5</b>	<b>13</b>	<b>11</b>
Illinois	2	4	-	-	1	2
Michigan	2	3	-	1	1	1
<b>Eastern US</b>	<b>9</b>	<b>10</b>	<b>8</b>	<b>11</b>	<b>7</b>	<b>7</b>
Connecticut	2	2	2	2	<1	<1
New Jersey	2	2	1	-	<1	<1
<b>Canada</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>14</b>	<b>15</b>
<b>Other International</b>	<b>7</b>	<b>11</b>	<b>2</b>	<b>2</b>	<b>11</b>	<b>13</b>
Australia	2	4	-	-	2	3
France	1	1	-	-	1	2
New Zealand	1	1	-	-	1	1

## Party and Group Size

The survey asked two questions regarding the size of travel party: the first (“party size”) referred to the number of people with whom the respondent was sharing expenses, while the second (“group size”) referred to the total number of people traveling in the group, regardless of expense-sharing.

- Air visitors reported an average party size of 2.1 people, with over half of visitors (56 percent) traveling in parties of two.
  - Among air visitors, vacation/pleasure visitors reported a slightly larger average party size (2.3 people), compared with VFRs (2.1 people) and business travelers (1.6 people).
- Ferry visitors reported an average party size of 2.2, and like air visitors, were most likely to be traveling in parties of two (63 percent).

**Table 29. Party Size (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
One person	27	12	30	68	17	15
Two people	56	70	47	24	63	67
Three people	8	8	12	4	12	11
Four or more people	9	10	11	5	8	7
<b>Average party size</b>	<b>2.1</b>	<b>2.3</b>	<b>2.1</b>	<b>1.6</b>	<b>2.2</b>	<b>2.1</b>

- Reported group size among air visitors was very similar to average party size, although those traveling in groups of four or more people was larger (16 percent for group size versus 9 percent for party size).
  - Group size was essentially the same as party size for VFRs and business travelers, while the percentage of those in groups of four or more people was higher among vacation/pleasure visitors (18 percent versus 10 percent for party size).
- Ferry visitors tended to report the same number of people in their group as in their party; the average increased only marginally (from 2.2 to 2.3 people).

**Table 30. Group Size (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=437	Vacation/ Pleasure n=244	VFR n=112	Business n=81	Total Ferry n=282	Vacation/ Pleasure n=237
One person	25	10	28	65	15	14
Two people	53	65	46	23	60	63
Three people	7	7	11	2	12	12
Four or more people	16	18	15	9	12	11
<b>Average group size</b>	<b>2.3</b>	<b>2.5</b>	<b>2.2</b>	<b>1.6</b>	<b>2.3</b>	<b>2.3</b>

## Gender and Age

Respondents were asked for the gender and age not only of themselves but of every member of their immediate party; these results reflect the entire party, rather than the respondent.

- Air visitors were slightly more likely to be male (53 percent versus 47 percent). They reported an average age of 53 years old, with 66 to 75 being the most common age group (23 percent).
  - Vacation/pleasure visitors reported the highest average age at 57 years old, followed by VFRs at 50 years old, then business travelers at 47 years old. VFRs were the most likely to be traveling with minors: 9 percent, versus 6 percent of vacation/pleasure visitors and 2 percent of business travelers.
- Ferry visitors reported an even gender split of 50/50, and a similar average age to air visitors (54 years old). The most common age group among ferry visitors was 56 to 65 (28 percent).

**Table 31. Age and Gender (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
<b>Gender</b>						
Male/female	53/47	53/47	46/54	65/35	50/50	49/51
<b>Age</b>						
Under 18	6	6	9	2	9	7
19 to 25	6	4	8	9	5	4
26 to 35	10	9	12	11	8	7
36 to 45	12	9	12	25	9	9
46 to 55	18	17	17	24	14	14
56 to 65	21	22	19	20	28	29
66 to 75	23	28	18	8	24	27
76+	5	6	6	-	3	4
<b>Average Age</b>	<b>53 years</b>	<b>57 years</b>	<b>50 years</b>	<b>47 years</b>	<b>54 years</b>	<b>56 years</b>

Note: Age and gender reflect the entire travelling party, not just the respondent.

## Household Characteristics

- One out of five air visitors (20 percent) reported children in their household. About twice as many (42 percent) reported being retired or semi-retired.
  - Among air visitors, business travelers were the most likely to report children in their household (32 percent), compared with VFRs (23 percent) and vacation/pleasure visitors (15 percent). Accordingly, vacation/pleasure visitors were the most likely to report being retired or semi-retired (54 percent), compared with VFRs (38 percent) and business travelers (11 percent).
- Ferry visitors were about as likely as air visitors to report children in their household (17 percent) but were more likely to report being retired or semi-retired (55 percent).

**Table 32. Children Living in Household and Retirement Status (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Children living in household	20	15	23	32	17	14
Retired or semi-retired	42	54	38	11	55	60

- Over two-thirds of air visitors (68 percent) reported having at least a Bachelor's degree.
  - Bachelor's degree (or higher) attainment was highest among vacation pleasure visitors at 75 percent; this compares with 66 percent among business travelers and 53 percent among VFRs.
- Ferry visitors about as likely as air visitors to have attained at least a Bachelor's (72 percent).

**Table 33. Education (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Some high school	<1	<1	-	-	1	<1
High school diploma/GED	7	6	9	7	5	5
Associate/technical degree	5	4	9	5	6	6
Some college	12	8	21	13	10	6
Graduated from college	35	35	30	40	34	33
Master's/Doctorate	33	40	23	26	38	41
Don't know/refused	8	8	7	8	7	8

- Air visitors reported an average household income of \$116,000.
  - Average income was highest among vacation/pleasure visitors at \$132,000, followed by business travelers at \$117,000, then VFRs at \$86,000.
- Ferry visitors reported about the same average income as air visitors at \$115,000.

**Table 34. Household Income (%)**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Less than \$25,000	3	1	5	4	3	3
\$25,000 to \$50,000	7	5	13	5	6	6
\$50,000 to \$75,000	8	6	13	6	11	11
\$75,000 to \$100,000	14	10	18	19	14	14
\$100,000 to \$125,000	9	8	9	13	6	6
\$125,000 to \$150,000	6	8	4	1	8	8
\$150,000 to \$200,000	10	13	5	11	8	9
Over \$200,00	9	12	3	10	10	11
Don't know/ref	33	35	28	32	33	22
<b>Average Income</b>	<b>\$116,000</b>	<b>\$132,000</b>	<b>\$86,000</b>	<b>\$117,000</b>	<b>\$115,000</b>	<b>\$117,000</b>

# Visitor Spending

- Air visitors spent an average of \$704 per person in Juneau. The highest spending category was lodging (\$196), followed by food/beverage (\$136), tours/activities (\$114), rental cars/fuel/transportation (\$60), and gifts/souvenirs/clothing (\$59). Average spending on overnight packages was \$136 per person (although just 9 percent of air visitors purchased an overnight package).
  - Among air visitors, vacation/pleasure visitors reported the highest spending (\$844) followed by business travelers (\$656) and VFRs (\$435). Spending patterns differed as might be expected, with VFRs reporting lower spending on lodging, and business travelers reporting low spending on tours/activities.
- Ferry visitors reported lower spending than air visitors, at \$440 per person. Their spending was largely concentrated in lodging (\$135), food/beverage (\$108), and tours/activities (\$103).

**Table 35. Visitor Expenditures in Juneau, Per Person, Per Trip**

	AIR VISITORS				FERRY VISITORS	
	Total Air n=444	Vacation/ Pleasure n=248	VFR n=112	Business n=84	Total Ferry n=284	Vacation/ Pleasure n=237
Lodging	\$196	\$216	\$80	\$318	\$135	\$139
Tours/activities	\$114	\$162	\$82	\$25	\$103	\$116
Gifts/souvenirs/clothing	\$59	\$63	\$65	\$39	\$49	\$53
Food/beverage	\$136	\$119	\$157	\$161	\$108	\$102
Rental cars/fuel/ transportation	\$60	\$50	\$43	\$112	\$43	\$41
Packages	\$136	\$232	*	-	*	*
Other	\$3	\$2	\$8	\$1	\$2	\$3
<b>Total</b>	<b>\$704</b>	<b>\$844</b>	<b>\$435</b>	<b>\$656</b>	<b>\$440</b>	<b>\$454</b>

\* Sample size too small for analysis.



# Visitor Volume

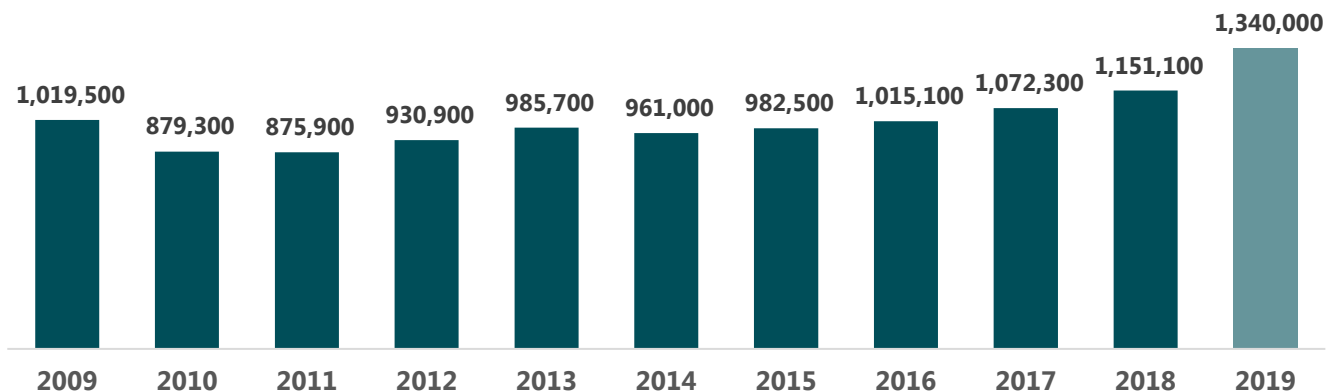
Juneau welcomed an estimated 1,229,100 out-of-state visitors between May and September of 2018. Cruise passengers represented 94 percent of the total (1,151,100); air visitors represented 5 percent (63,000), and ferry visitors represented 1 percent (15,000).

Since the last time Juneau visitor volume was measured in 2016, the total number of visitors increased by 13 percent, from 1,093,000 to 1,229,100. Most of the increase was attributable to the cruise market, which increased by 13 percent. The air market increased by 4 percent, and the ferry market decreased by 12 percent.

Visitor volume for summer 2016 is based on the Alaska Visitor Statistics Program 7, conducted by McDowell Group for the Alaska Department of Commerce, Community, and Economic Development. Cruise volume for 2018 is based on data from Cruise Line Agencies of Alaska, supplemented by passenger counts from small cruise ship lines. (Cruise volume includes small ship passengers, many of whom use the Juneau airport and were included in the summer survey.) Air and ferry volumes for 2018 were based on percentage changes in summer traffic volumes at the Juneau airport and Juneau ferry terminal.

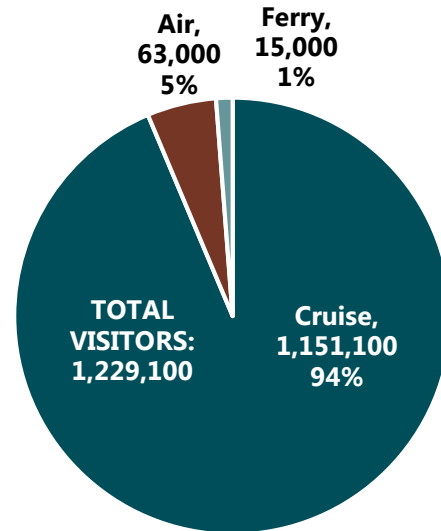
The chart below shows how Juneau cruise volume has grown over the last decade. The 2018 volume (1,151,100) was 31 percent above the 2011 low (875,900). The 2019 volume is projected to be 16 percent above the 2018 volume.

**Juneau Cruise Passenger Volume, 2009-2018 (2019 Projected)**



Sources: Cruise Line Agencies of Alaska and small ship lines.

**Table 36. Juneau Visitor Volume, Summer 2018**



**Table 37. Juneau Visitor Volume, 2016 and 2018**

	2016	2018	% Change
Cruise	1,015,000	1,151,100	+13%
Air	61,000	63,000	+4%
Ferry	17,000	15,000	-12%
<b>Total</b>	<b>1,093,000</b>	<b>1,229,100</b>	<b>+13%</b>

Source: Alaska Visitor Statistics Program 7; McDowell Group estimates.

Following are uncategorized ("other") responses to open-ended questions in the survey.

## **What types of lodging did you use in Juneau?**

Airport  
Car – no rooms  
Shrine  
UAS student hosing

## **Where else did you or will you over night in Southeast?**

**Angoon (x2)**

Hyder

**Pelican (x2)**

**Yakutat (x3)**

## **What modes of transportation did you or will you use to travel around Southeast?**

Helicopter  
**Personal boat (x2)**

## **What activities did you participate in while in Juneau?**

Arboretum  
**Boating (x3)**  
**Celebration (x4)**  
Golf  
NOAA  
**Whale Statue (x4)**  
**Zipline (x5)**

## **What activities would you have liked to do in Juneau, that you didn't get a chance to?**

**Arboretum (x3)**  
Bike & Brew Tour  
Climbing mountains  
Eagle Beach  
Echo Cove  
Fly fishing  
Glacier Bay  
Gold mine

Heli ski

**Ice caves (x3)**

Paragliding

Swimming

Swimming in Gastineau Channel

Whale statue

**Zipline (x3)**

**Which other websites or apps did you use in planning your trip?**

**AARP (x3)**

abak.com

**AllStays App (x2)**

Alltrails.com

AMA

Auk Rec Campground

Bing

Birds of AK

Campground

Camping.gov

Cheap Tx

Chipmunk

Company site

Corp web

Credit card company

DNP

Ferry Travel Gateway

Fish & Game

Good Sam

Government site

Hiking App

**Home Away (x2)**

Hostel.info

Juneau Chamber

Juneau Kayak

Milepost

North of Alaska

**NPS.gov (x2)**

REI

**Reserve America (x2)**

Roadtrippers

SkyScanner

Travel Club

**Viator (x2)**

Wells Fargo Air Travel

**YouTube (x6)**

**Which other websites or apps did you use in booking your trip?**

AARP

Abak.com

Camping.gov

Cheap Tx

Company site

Corp web

Credit card company

Fish & Game

Government site

Home Away

Hostel.info

Juneau Kayak

REI

Reserve America

Viator

Wells Fargo Air Travel

**What other sources of information did you use to get information about Juneau not including online sources?**

Campground

Fishing registration

**What other sources of information did you use while in Juneau?**

Fish & Game

Forest Service

Library